

## Planning, Infrastructure and Place Advisory Group: Agenda

Date and Time: 8<sup>th</sup> February 2024 10:00-14:00 [ONLINE ONLY]

### Attendees

#### *Joint Chairs*

Fiona Simpson, Scottish Government

Tony Rose, Scottish Futures Trust

#### *Core Group*

Richard Ballantyne, British Ports

Susan Campbell, Scottish National Investment Bank

David Cowan, Scottish Government

Iain Docherty, Stirling University

Pam Ewen, Heads of Planning Scotland

John Hamilton, Winchburgh Developments

Martin McKay, Clyde Gateway

Ailsa Raeburn, Community Land Scotland

Pauline Smith, Development Trust Association Scotland

John Trower, Optiminity

Kat White, Scottish Government

Soren Jensen, Infrastructure Transparency

Hamish Trench, Scottish Land Commission

Scott Mathieson, Scottish Power Energy Networks

Rachel Skinner, WSP

Jane Wood, Homes for Scotland

#### *Support*

Lorna Aird, Scottish Government

Lynne Ward, Scottish Futures Trust

Greg Walker, Scottish Government

Katie Ferrie, Scottish Futures Trust

### Apologies

Francesca Osowska, Nature Scot

## AGENDA

	Item	Topic	Section	Pages
10:00	1.0	Introduction & Apologies		
		Whole group discussion		
	2.0	<b>Minute of Previous Meeting</b> <b>Brief Winchburgh update</b> <b>Present 2024 Work Programme</b>	<b>Section 1</b> <ul style="list-style-type: none"> <li>• <a href="#">Minutes from previous meeting</a></li> <li>• <a href="#">Summary</a> and <a href="#">Full</a> 2024 work programme</li> <li>• <a href="#">Revised Winchburgh Template (FINAL)</a></li> <li>• <a href="#">SLWG Principles paper</a></li> <li>• <a href="#">Revised case study template</a></li> </ul>	4-8  9-10 11-14  15-20  21  22
10:20	3.0	<b>Sector based discussion</b> <b>Net Zero energy Teach in: Overview from Scott Mathieson, SPEN</b> <p>Presentation: Net Zero energy infrastructure strategic challenges and delivery (with a focus on solutions).</p> <p>Discussion:</p> <ul style="list-style-type: none"> <li>• Members to discuss specific examples where solutions are required / have been implemented.</li> <li>• What specifically can PIPAG do to support solutions?</li> </ul> <p>Output: Notes on template questions to enable secretariat to fully complete paper.</p>	N/A	N/A
<b>11:55 LUNCH BREAK</b>				
12:30	4.0	<b>Place Based Review</b> Place based examples of town centre regeneration <p>Presentation/s: Christine Webster, Aberdeenshire Council is joining to talk about</p>	N/A	N/A

	Item	Topic	Section	Pages
		<p>the Fraserburgh experience and Diarmaid Lawlor, SFT, will talk about Selkirk. Pauline Smith, DTAS, will cover Campbeltown.</p> <p>Discussion: What infrastructure interventions are needed support town centre regeneration? Is there a link to the sector based topic above? What can PIPAG do?</p> <p>Output: Notes on template questions for secretariat to complete. Identification of next steps / areas for deeper dive.</p>		
<b>2pm</b>	<b>5.0</b>	<b>AOB and close</b>		

## Section 1: Planning, Infrastructure and Place Advisory Group: Minute

Meeting No: 3  
Date and Time: 12<sup>th</sup> December 2023 10:00-14:00  
Place: Online only

### Attendees

#### *Joint Chairs*

Fiona Simpson, Scottish Government  
Tony Rose, Scottish Futures Trust

#### *Core Group*

Richard Ballantyne, British Ports  
Susan Campbell, Scottish National Investment Bank  
David Cowan, Scottish Government  
Iain Docherty, Stirling University  
Pam Ewen, Heads of Planning Scotland  
John Hamilton, Winchburgh Developments  
Martin McKay, Clyde Gateway  
Pauline Smith, Development Trust Association Scotland  
John Trower, Optiminity  
Soren Jensen, Infrastructure Transparency  
Hamish Trench, Scottish Land Commission  
Scott Mathieson, Scottish Power Energy Networks  
Rachel Skinner, WSP

#### *Support*

Lorna Aird, Scottish Government  
Katie Ferrie, Scottish Futures Trust  
Greg Walker, Scottish Government  
Steven Mackie, Scottish Government

### Apologies

Jane Wood, Homes for Scotland  
Francesca Osowska, Nature Scot  
Ailsa Raeburn, Community Land Scotland  
Kat White, Scottish Government  
Suzanne Stephen, Scottish Government (Support)  
Lynne Ward, Scottish Futures Trust (Support)

Item	Topic	Action
1.0	<b>Introduction &amp; Apologies</b>	
	FS welcomed everyone to the third meeting of PIPAG and provided a high-level overview of the agenda and objectives of the meeting.	
2.0	<b>Minute of Previous Meeting</b>	
	There were no comments, amendments or additional points.	
3.0	<b>Action from Previous Meeting</b>	
	<p>Actions from the previous meeting were discussed and it was noted that majority of actions are now complete. It was noted that the action to write-up the Winchburgh template was currently at draft stage and was due to be discussed at today's meeting.</p> <p>There were no additional comments from the group.</p>	
4.0	<b>Winchburgh Discussion</b>	
	<p>TR introduced this section of the meeting and provided a summary and some reflections of the group's recent site visit to Winchburgh on 7<sup>th</sup> September for those unable to attend. The Winchburgh infrastructure template was introduced and it was noted that the paper was developed to draw together the discussion, insights, findings and outcomes of the site visit. The Short Life Working Group (SLWG) paper was also briefly introduced and it was noted that the rationale for this paper was to develop a focussed group to further consider the lessons learned from the Winchburgh project, with particular focus on funding and financing mechanisms and the roles of the key players involved.</p> <p>It was highlighted that the purpose of today's Winchburgh discussion was for the core group to reflect on the two papers and to consider the key infrastructure opportunities and challenges that arose from the Winchburgh site visit, with a view to agreeing the key drivers of activity the group can explore further. There was recognition that the core group cannot address all opportunities and challenges that are identified, but that dedicated SLWGs could provide a platform for self-identifying members of the group to focus on specific priority areas relevant to particular place-based examples.</p> <p><u>Winchburgh Infrastructure Template</u></p> <p>There was an initial broad discussion around the energy infrastructure provision for Winchburgh, particularly for new residential developments. The option of a dedicated session to focus on energy systems, grid interface and infrastructure processes led by SPEN was proposed.</p>	<p><b>Secretariat:</b> To explore option of dedicated session on energy systems infrastructure supported by SPEN.</p>

Item	Topic	Action
	<p>A wider discussion followed regarding the structure, content, and recommendations of the Winchburgh Infrastructure Template paper, with the group sharing useful suggestions. There was consensus that the Winchburgh Infrastructure Template was well-structured and effectively highlighted a series of key challenges along with proposed solutions. The group also acknowledged the need for the template to have a slightly sharper focus on other key challenges, such as emphasising community involvement and addressing energy system infrastructure provision in alignment with decarbonisation targets. It was agreed that the Winchburgh Infrastructure Template would undergo a final review to ensure that these minor additions are suitable addressed. Additionally, the inclusion of case studies would be explored to highlight ongoing good practices in Winchburgh.</p> <p><u>Winchburgh Short Life Working Group (SLWG) Scope Proposal</u></p> <p>The objectives and proposed scope for the Winchburgh SLWG were considered. It was noted that the intention for SLWGs was to have a small group of 2-4 representatives from the core PIPAG membership who are interested in understanding the Winchburgh delivery model in more detail and identifying key focus areas and lessons that are replicable to delivering other infrastructure projects. It was suggested that the group would meet 2-3 times over a four month period and it would be formed of self-identifying core group members. It was noted that representation from the reference group members would also be sought, and core PIPAG members were invited to share their suggestions. It was highlighted that resource from the wider PIPAG secretariat would be made available to support with SLWG activities.</p>	<p><b>Secretariat:</b> Refine Winchburgh Infrastructure Template paper incorporating as appropriate case studies and re-circulate for next meeting.</p> <p><b>Secretariat:</b> Refine Winchburgh SLWG paper incorporating any final changes and re-circulate for next meeting.</p> <p><b>All:</b> Members to consider volunteering to join Winchburgh Delivery Model SLWG and inform secretariat.</p> <p><b>All:</b> Members invited to make recommendations for reference group membership of Winchburgh SLWG.</p> <p><b>Secretariat:</b> Develop standard principles to apply to all SLWGs and finalise membership for Winchburgh SLWG.</p>
5.0	LDP Deep-dive	

Item	Topic	Action
	<p>CT delivered a presentation on the new-style LDPs and their interconnection with infrastructure delivery.</p> <p>An engaged group discussion followed on the importance of LDPs as part of the planning system and infrastructure being a core focus of LDPs. Ideas and solutions to potential challenges with the new approach were provided by the group. The discussion focussed on issues such as options for the facilitation of collective information and data sharing across key stakeholders; what can be done from a national perspective to support LDP cooperation; the sharing of existing good LDP practice; ensuring the LDP process is supported by transparency; and the unlocking of brownfield sites across Scotland.</p> <p>As part of the discussion, the recent Chief Planner letter was noted as being a useful update on NPF4 related activities and members were encouraged to review it <a href="#">here</a>.</p> <p>The group were thanked for their insightful contributions and it was agreed that these would be reflected upon accordingly, with the potential to consult with reference group members also proposed. A summary of reflections from the LDP deep-dive discussion will be shared with the group for the next meeting.</p>	<p><b>Secretariat:</b> Circulate LDPs and infrastructure slide-deck to group.</p> <p><b>All:</b> note the Chief Planner Autumn Update Letter</p>
<b>6.0</b>	<b>Work Program Discussion</b>	
	<p>The work program discussion was firstly introduced with a high-level overview of the proposed PIPAG activities and series of site visits.</p> <p>A summary presentation on the governance and reporting structure of PIPAG, the key challenges / 'exam questions', the proposed site visit location plan and corresponding issues and the form of outputs of PIPAG was delivered.</p> <p>A constructive group discussion followed on the cross-cutting nature of PIPAG and the need to prioritise challenges which the group can explore, in alignment with the critical role and distinct contribution of the group. The group provided suggestions on the potential challenges which the core and/or SLWGs could focus on. It was noted that a useful next step would be to host a dedicated session to identify gaps in infrastructure challenges and to map those in which PIPAG would have specific expertise in exploring. The group were in agreement that a supporting cross-reference exercise should be completed in parallel to ensure that any infrastructure challenges identified by the group are not already being addressed by other groups or organisations, and to also establish if there are other groups or organisations who would be better placed to address such identified challenges.</p>	<p><b>Secretariat:</b> Consider dedicated infrastructure challenge identification and mapping session.</p> <p><b>Secretariat:</b> Reconsider the site visit plan/approaches and update the work program, reflecting group recommendations, and re-circulate for group review in advance of next meeting.</p>

Item	Topic	Action
	<p>There was consensus that the proposed series of in-person site visits, while useful, might not be the most effective use and investment of the group’s time. Recommendations were proposed by the group regarding the proposed approach of using site visits as the main procedure of identifying different challenges for the group to consider. It was felt by the group that the challenges associated with project sites could be identified by the group, in consultation with the project representatives and stakeholders, without the requirement of an in-person site visit. It was therefore agreed that there will be a rationalisation of proposed in-person site visits and potential alternative approaches to in-person site visits, including virtual options and preliminary suitability selection with project leads of proposed sites, with an emphasis on place-based and sectoral considerations.</p> <p>As a useful next step, It was decided that the site visit plan would be updated to reflect recommendations that: in-person site visits are only by exception; may be for a sub-group of members; there are alternative options proposed for site visits (e.g., virtual/remote options,); include, where identified, the rationale for any remaining visits; include, where identified, the focus of any site visits (e.g., funding and financing); and include the main project representatives/stakeholders for selected sites.</p> <p>It was concluded that the work program will be redesigned to reflect the views and recommendations shared by the group, ensuring that alignment with the core purpose and objectives of PIPAG is maintained.</p>	
11.	<b>AOB and Close</b>	
	<p>TR closed the meeting with thanks to all attendees and their valuable contributions.</p> <p>Those who volunteered to be part of the Winchburgh SLWG will be contacted by the Secretariat in the New Year.</p> <p>It was noted that the next meeting will be held on 8<sup>th</sup> February. Timings, agenda and location will be confirmed in early 2024.</p>	<p><b>Secretariat:</b> Confirm timings, location and agenda for next meeting.</p>



## PIPAG Work Programme 2024: Summary

Each meeting to explore, for a place type and sector or issue:

- What are the problems?
- What solutions are being found?
- What are the remaining barriers?
- What could a sub group / further work by the Secretariat usefully focus on to make practical recommendations?

Meetings will run as online discussions by default, but with an optional site visit as agreed with the group, where it adds value.

Timing	Place based	Sector / issue based discussion	Subgroup Reviews
Feb	<p><b>Place Review 2<sup>1</sup>: What infrastructure interventions are needed support town centre regeneration?</b></p> <ul style="list-style-type: none"> <li>• SG Regeneration – town centre regeneration – Dumfries, East Ayrshire</li> <li>• DTAS – community led examples – Huntly, Helmsdale, Mull and Iona</li> </ul>	Teach in 2: <sup>2</sup> Net Zero Energy infrastructure strategic challenges and delivery (with a focus on solutions) – teach in and discussion	
May	<p><b>Place Review 3: What supporting infrastructure is needed to support major development required for net zero in a rural context (e.g. housing, services, access etc.)?</b></p> <ul style="list-style-type: none"> <li>• Nature Scot – Hagshaw Energy Cluster</li> <li>• Highland Council / HiE/British Ports – Port of Cromarty and associated development</li> </ul>		Review of funding and finance outputs (Place Review 1: Winchburgh). Review of energy systems outputs (Teach in 2).
Aug	<p><b>Place Review 4: How do we make vacant and derelict land a more viable development and investment proposition?</b></p> <ul style="list-style-type: none"> <li>• Clyde Gateway</li> <li>• Fife Council – medium sized site</li> </ul>		Place Review 2: town centre outputs. Place Review 3: Net Zero in rural context
Oct	<p><b>End of year review</b> Discussion of draft 2024 annual report</p>	Teach in 3 TBD	Place Review 3: Net Zero in rural context Place Review 4: Vacant and

<sup>1</sup> Place review 1 was the Winchburgh site visit

<sup>2</sup> Teach in 1 was a review of the LDP process and priorities in 2023

			derelict land outputs.
Dec	Agreement of finalised 2024 annual report Agreement of 2025 work programme		

## PIPAG Work Programme 2024

Each meeting to explore, for a place type and sector or issue:

- What are the problems?
- What solutions are being found?
- What are the remaining barriers?
- What could a sub group / further work by the Secretariat usefully focus on to make practical recommendations?

All meetings will take place online (via MS Teams) by default.  
Site visits will be optional and agreed with the core group in advance, and where they are deemed to add value.

**Place Review 1:** Winchburgh development and delivery model

**Place Review 2:** What infrastructure interventions are needed support town centre regeneration?

**Place Review 3:** What supporting infrastructure is needed to support major development required for net zero in a rural context (e.g. housing, services, access etc.)?

**Place Review 4:** How do we make vacant and derelict land a more viable development and investment proposition?

Assigned to	Activity	Activity Detail	Status	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24
	PIPAG Core Meetings	Online meetings or site visits (as agreed by core group)	Planned		Meeting 4 Confirmed (8th Feb)			Meeting 5 Planned (16/5)			Meeting 6 Planned (29/8)		Meeting 7 Planned (Date TBC)		
SLWG 1	SLWG activity for Place Review 1 (Winchburgh)	<ul style="list-style-type: none"> <li>• SLWG 1 development and meetings</li> <li>• Winchburgh delivery model/funding/financing exploration and infrastructure template finalisation</li> <li>• SLWG 1 final review by PIPAG core group to take place at Meeting 5 in May</li> </ul>	In Progress												

Assigned to	Activity	Activity Detail	Status	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24
	PIPAG Core Meetings	Online meetings or site visits (as agreed by core group)	Planned		Meeting 4 Confirmed (8th Feb)			Meeting 5 Planned (16/5)			Meeting 6 Planned (29/8)		Meeting 7 Planned (Date TBC)		
PIPAG	Meeting 4 - Place Review 2: What infrastructure interventions are needed support town centre regeneration?	<ul style="list-style-type: none"> <li>SG Regeneration – town centre regeneration – Dumfries, East Ayrshire</li> <li>DTAS community led examples – Huntly, Helmsdale, Mull and Iona</li> </ul>	Planned												
Secretariat	Meeting 4 -Teach in 2: Net Zero energy systems and solutions	<ul style="list-style-type: none"> <li>Teach in and discussion led by SPEN</li> </ul>	Planned												
SLWG 2	SLWG activity for Place Review 2 (Town Centre)	<ul style="list-style-type: none"> <li>SLWG 2 development and meetings</li> <li>Review of town centre regeneration interventions and outputs</li> <li>SLWG 2 final review by PIPAG core group to take place at Meeting 6 in August</li> </ul>	Planned												
PIPAG	Meeting 5 - Place Review 3: What supporting infrastructure is needed to support major development required for net zero in a rural context (e.g. housing, services, access etc.)?	<ul style="list-style-type: none"> <li>Nature Scot – Hagshaw Energy Cluster</li> <li>Highland Council / HIE/British Ports – Port of Cromarty and associated development</li> <li>Review of energy systems outputs (Teach in 2)</li> </ul>	Planned												

Assigned to	Activity	Activity Detail	Status	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24
	PIPAG Core Meetings	Online meetings or site visits (as agreed by core group)	Planned		Meeting 4 Confirmed (8th Feb)			Meeting 5 Planned (16/5)			Meeting 6 Planned (29/8)		Meeting 7 Planned (Date TBC)		
SLWG 3	SLWG activity for Place Review 3 (Net Zero in rural context)	<ul style="list-style-type: none"> <li>• SLWG 3 development and meetings</li> <li>• Review of infrastructure needed to support major development required for net zero in a rural context</li> <li>• SLWG 3 initial review by PIPAG core group to take place at Meeting 6 in August</li> <li>• SLWG 3 final review by PIPAG core group to take place at Meeting 7 in October</li> </ul>	Planned												
PIPAG	Meeting 6 - Place Review 4: How do we make vacant and derelict land a more viable development and investment proposition?	<ul style="list-style-type: none"> <li>• Clyde Gateway</li> <li>• Fife Council – medium sized site</li> <li>• SLWG 2 final review by PIPAG core group</li> <li>• SLWG 3 initial review by PIPAG core group</li> </ul>	Planned												
SLWG 3	SLWG activity for Place Review 4 (Vacant and derelict land outputs)	<ul style="list-style-type: none"> <li>• SLWG 4 development and meetings</li> <li>• Review of vacant and derelict land as a more viable development and investment proposition</li> <li>• SLWG 4 initial review by PIPAG core group to take place at Meeting 7 in October</li> </ul>	Planned												

Assigned to	Activity	Activity Detail	Status	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24
	PIPAG Core Meetings	Online meetings or site visits (as agreed by core group)	Planned		Meeting 4 Confirmed (8th Feb)			Meeting 5 Planned (16/5)			Meeting 6 Planned (29/8)		Meeting 7 Planned (Date TBC)		
PIPAG	Meeting 7 - PIPAG End of year review	<ul style="list-style-type: none"> <li>Discussion of draft 2024 annual report</li> <li>SLWG 3 final review by PIPAG core group</li> <li>SLWG 4 initial review by PIPAG core group</li> </ul>	Planned												
Secretariat	Meeting 7 - Teach in 3: To be confirmed	<ul style="list-style-type: none"> <li>Teach in 3 details to be confirmed in due course</li> </ul>	Planned												
Secretariat	PIPAG 2024 annual report	<ul style="list-style-type: none"> <li>Agreement of the finalised 2024 annual report</li> </ul>	Planned												
Secretariat	PIPAG 2025 work programme	<ul style="list-style-type: none"> <li>Agreement of the 2025 work programme</li> </ul>	Planned												

# Winchburgh Infrastructure Template (Final)

## WINCHBURGH INFRASTRUCTURE CASE STUDY JANUARY 2024

### INTRODUCTION

PIPAG visited Winchburgh on the 7th September 2023. The group had a tour of the site, led by Winchburgh Developments and gained an insight into the infrastructure challenges and opportunities of the project. This paper provides an overview of the discussion, findings and next steps.

### Scenario Background

Winchburgh Developments Ltd are lead Developers at Winchburgh and lead partners include West Lothian Council, Bellway Homes, Barratt Homes, Taylor Wimpey, Cala, Robertson and J Smart and Co as well as Winchburgh Owners Association. Community groups have also been instrumental.

Winchburgh is a key area which has been identified for growth at the local, regional and national level.

The masterplanned site is at an advanced stage of development including c. 3500 residential units (including 25% affordable), four schools (2 primary, 2 secondary) as well as community facilities (including library and health centre) and transport infrastructure (including new rail station and motorway junction and. 50 acres of commercial and retail development.

The headline challenges and issues raised by this scenario include:

- digital infrastructure
- Funding solutions
- Land remediation
- Schools Infrastructure funding, phasing and delivery
- Implications of energy decarbonisation targets on infrastructure provision
- Transport infrastructure delivery

Winchburgh is typical in the sense that it is a large scale urban expansion. Issues of funding and delivery of infrastructure are also typical in developments of this scale. However, this example particularly demonstrates the benefits of positive collaboration between the developer and the Council, the sharing of investment risk, as well as a developer with close links between existing and incoming communities and developer. The community is thriving from the grass roots, as evidenced by a gardening group, park run and regular farmers market to name just a few initiatives.

Land values in Winchburgh are likely to be higher than other areas of the country given its proximity to Edinburgh. Indeed, there has been a significant rise in land values since work on the site commenced work, however, they still remain below the Capital.

An application for planning permission in principle was initially submitted in 2005, and approved in 2012, subject to a s75 application. The application outlined 352ha of development including residential, commercial, industrial, recreation & retail uses, community facilities, landscaping & open space, road and rail infrastructure, including M9 junction, train station, park & ride, primary &

secondary schools. The masterplan has been adjusted since that time and the development of the site has progressed.

Further homes are being completed at Seton rise, and further retail and commercial space is anticipated around the new motorway junction.

### **Infrastructure types involved**

**Economic, social & natural infrastructure:** housing, retail, commercial space, education, green & blue, community

Further homes are being completed at Seton rise, and further retail and commercial space is anticipated around the new motorway junction.

This example considers transport infrastructure (roads and rail), education, green and blue infrastructure, community facilities along with heat and energy networks.

The planning permission in principle (PIP) built-in conditions which phased the provision schools, neighbourhood and town parks, and transport infrastructure to ensure alignment and delivery alongside housing provision.

The first phase involved the delivery of 550 houses. During this phase, education contributions went to an existing school in the district before the new schools were delivered on site. Once this cap of 550 houses was reached, planning conditions required that a financing solution was agreed for a non-denominational secondary school.

Significant work went into land remediation at Auldcathie Park to enable it to be a safe and accessible park facility for the community. It is now well used and central to the community. The former landfill site was required to be fully remediated before occupation of the nearby secondary school. The development management scheme provided for the long term maintenance of landscaping in newly consented areas.

A new motorway junction was required to be in operation before occupation of the 1000<sup>th</sup> house. Provision of a park and ride was also required by planning condition.

Provision of local / neighbourhood and town parks were conditioned in at various stages of dwellings completions.

The pedestrian crossing delivered at the town centre and the station were examples of using monies from contributions to support local priorities.

### **Funding**

**Public & Private:** Winchburgh Developments Ltd, Scottish Government, West Lothian Council, National Rail?

In terms of education, funding was sought through the city deal as Winchburgh was identified in the Edinburgh and South East Scotland City region deal signed on 7 August 2018. Scottish Government made a commitment to invest up to £150 million on a risk sharing basis with West Lothian Council to unlock up to 5000 new homes in Winchburgh.



West Lothian Council front funded education and bore the risk of developer contributions not being delivered. Developer contributions meanwhile from across West Lothian were used to fund new schools as the delivery of a new school opened up housing capacity across the district.

However, Scottish Government support was sought from the Finance and Constitution committee as the developer was unable to secure affordable marking rate finance and WLC were carrying the maximum risk allowable under their governance arrangements.

This support was provided through a Tripartite funding agreement to share the risk of funding one of the secondary schools, and the other was a Housing Infrastructure Loan to support financing of extra works covering roads, remediation and a motorway junction to support housing delivery. The Scottish Government standby facility helped to unlock Winchburgh and manage Scottish Government's exposure to risk in a balanced way. (HIF funding excludes schools).

The provision of schools in Winchburgh and developer contributions to education have unlocked housing opportunities across West Lothian.

In this case, offsite strategic infrastructure wasn't required in addition to onsite provision. The park and ride and rail station facility, however, may have a regional impact on transport movements. Early estimates of the cost of a rail station were 2 million but now estimates have gone up to 17 million.

### **Infrastructure providers involved**

**Public, Private, Third Sector:** Winchburgh Developments Ltd, Network Rail, Scottish Canals, Transport Scotland

Winchburgh developments have been working closely with Network Rail in relation to the rail station. Winchburgh developments undertook land remediation around Auldathie park and work closely with and support community groups. Scottish Canals have been closely involved in plans for the Marina on the Union Canal.

Issues have arisen with the provision of the rail station, as Transport Scotland objected to a condition requiring that no further units would be built until the station was completed at once a particular phase of the development was complete.

### **Issues and challenges**

**Energy, transport & digital Infrastructure provision:** energy policy targets, airport proximity, delivery models, funding of public infrastructure, economy downturn

#### ***Energy***

The most difficult issues to resolve have been energy provision for homes in light of decarbonisation targets resulting in increased build costs.

Barriers to delivery included being in the flight path so wind turbines were not an option. Other opportunities for renewable energy were also limited in this case. With regards to electricity, there are challenges around sufficiency of supply within Winchburgh to complete the masterplan. Plans are being made to build a primary substation in Winchburgh although this is not yet agreed.

### ***Land remediation***

The increasing costs involved of the rail station, land remediation etc have also been hurdles to be overcome.

### ***Transport***

Transport Scotland's stance on conditions relating to the station provision have also been another area requiring negotiation.

This issue was identified early on and was negotiated with Transport Scotland. There was no clause conditioning a development phase on provision of the railway station. An impact report has been produced which investigates the impact of a new rail station at Winchburgh on regional travel.

[Winchburgh Train Station Impact Report and City of Edinburgh Broxburn – Maybury road improvements consultation. - \(winchburghdevelopments.com\)](#)

### ***Education and Finance***

Problems were identified early on in the infrastructure lifecycle which meant that adequate funding was called into question. There was a funding gap for the new Schools, as West Lothian Council were already at their funding borrowing capacity.

A Tripartite agreement was prepared between Scottish Ministers, Winchburgh Developments and West Lothian Council. A summary of the agreement was presented to and approved by The Scottish Government Finance & Constitution Committee on 12th September 2018. It covers both the Tripartite Agreement and the £27m loan facility by the Housing Infrastructure Fund. This secured liability for the gathering of financial contributions for the new schools. Amounts drawn by WLC can only be used for the funding of the new school. Scottish Government operates a standby facility and WLC take the risk. Winchburgh developments agree to fill any shortfall in funding. £27 million towards the school was secured from HiF funding. The Council put forward a 60m pound loan for school and Winchburgh Developments took out a £27 million loan. All three primary and secondary school buildings and the Community Wellbeing Hub on Block L have now been completed, and the loan has been fully drawn down for the infrastructure delivery purposes set out in the papers.

### ***Other Issues***

Research has indicated that park and rides can increase car km and have a carbon impact. Other key challenges include siloing of infrastructure and schools being a barrier to development.

When the recession hit the business plan needed to be rewritten.

Development finance was challenging, and the significant development timescales have continually influenced progress. When the recession hit the business plan needed to be rewritten.

### **Worked Solutions**

**Financing model, planning flexibility & innovation:** Tripartite agreement, public/private collaborative approach

This case study demonstrates a range of funding and finance solutions to complex and multifaceted infrastructure challenges.

The Tripartite agreement worked well in that all three primary and secondary school buildings and the Community Wellbeing Hub on Block L have now been completed, and the loan has been fully drawn down for the infrastructure delivery purposes set out in the papers.

West Lothian Council were flexible with requirements around when infrastructure needed to be put in place to enable cash flow. The Council were clear from an early stage on their expectations regarding S75.

The Scottish Government and Scottish Futures Trust helped with the submission to the Finance Committee. Pinsent Mason were also very involved in developing this scheme. Collaborative working was clearly instrumental in this approach working.

### **Possible Solutions to Explore**

**Risk Appetite, Alternative Funds:** HiF funding access, revenue generation, Infrastructure Levy, S75 flexibility,

Consideration needs to be given to how can risk appetite and mitigation be managed better in the planning system. The core group feel consideration needs to be given to S75a applications, to amend legal agreements, as they can undermine the initial agreement and the Local Authority is often unable to refuse them and there is a perception that refusals would not be upheld at appeal.

West Lothian Council's approach to risk is something that could be considered further with a view to it being replicated by other authorities across Scotland. There may also be scope to develop the development trust model further, to generate income. The core group also suggested that consideration should be given to widening HiF funding to allow for its use for education infrastructure.

The challenging funding landscape will require innovation in finding funding sources. Consideration could be given to potential revenue generation onsite e.g. park and ride.

Looking at the regional picture may also provide funding solution. The role of city and growth deal funding in unlocking opportunities for development at scale.

Further consideration could be given to the role of an infrastructure levy in the up-front funding of infrastructure. A suggestion was made around exploring the potential for a government bond or guarantee scheme that could be funded by an Infrastructure Levy for specific types of infrastructure, with project cost recovery flowing from "standard" S.75 contributions.

The present funding landscape will require innovation to overcome challenges. Consider in detail where all the other funding opportunities are. Consider potential revenue generation onsite e.g. park and ride. Looking at the regional picture may also provide funding solutions i.e. deals.

## Summary Learning points & Action

### Funding & Partnership innovation, engagement, Development Management Scheme, Public versus private investment timelines, learning transferability and evolution

The key learning points from this example are:

1. Innovative funding and finance solutions
2. Positive collaboration between the developer and the Local Authority throughout the course of the project.
3. Education delivery and innovative approaches to funding challenges including a Tripartite funding agreement which required collaboration between the Local Authority, developer and Scottish Government.
4. A positive approach from the developer towards community involvement, as well as grass root engagement from the community itself, maintaining adaptability as the project progressed.
5. Rail station infrastructure delivery challenges
6. Adaptability in the face of national and global pressures in the form of financial crises, pandemic and ambitious decarbonation targets.
7. The importance of the Development Management Scheme to manage the land use and masterplan development.
8. In order to develop recommended solutions and / or good practice advice, it will be necessary to engage with infrastructure providers, Government departments/ agencies, local authority representative groups, specialists. Could practice evolve in response to learning points?
9. Could a government guarantee scheme underpin development funding and could this relate to the infrastructure levy?

Secretariat Actions:

- Findings to be shared on transforming planning webpages.
- Core group to agree issues / learning points meriting further exploration and reporting. Secretariat propose that key focus should be on funding mechanisms – those already secured and potential future options.
- Secretariat to work with lead members of the core group to facilitate input of wider reference group on Winchburgh case study as well as input into specific infrastructure providers.
- Findings to be reported at a subsequent meeting of the core group during 2024 and incorporated into annual report.

## Short Life Working Group (SLWG): Principles for Set-Up & Management

1. Confirm Terms of Reference (ToR) and remit (example provided for Winchburgh SLWG). SLWG will be responsible for delivering the output. An initial draft report will be submitted to PIPAG for review with a final report reflecting produced to reflect that input.
2. Confirm core Advisory Group membership, secretariat support and wider input from Reference Group and any specialist technical input required. Initial assumption of no more than 4 Advisory Group members per SLWG to encourage focus for members. Balance between Reference Group and Secretariat support to be determined on a case by case basis.
3. Confirm conflict of interest and confidentiality and approach to sharing of information/data
4. Develop detailed Programme and Work Plan including meetings/workshops and activities required in between these session and who responsible for undertaking specific tasks including specific secretariat support.
5. Confirm intended outcome/outputs from the SLWG (paper/report for discussion), responsibilities and timescales for production.
6. Confirm basis of engagement with PIPAG linked to key stages of the work (programme in with PIPAG meetings).
7. Production of paper/report and key findings including:
  - a. Implications of work for wider application and actions required for implementation
  - b. Wider stakeholder engagement/discussion and dissemination of findings
  - c. Any follow up or additional work for SLWG or others beyond the initial remit
8. Winding up of SLWG relative to original remit/ToR and recommendations on resource/governance for delivery of findings.

## Planning, Infrastructure and Place Advisory Group: Place/Sector Template

<b>Case Study:</b>	
<b>Date</b>	

1.0 Introduction			
2.0 Scenario Background			
2.1 Brief Description			
2.2 Governance / Partnership			
Public <input type="checkbox"/>	Private <input type="checkbox"/>	Third Sector <input type="checkbox"/>	Civic Society/ Community <input type="checkbox"/>
3.0 Infrastructure Types Involved			
4.0 Funding			
Public <input type="checkbox"/>	Private <input type="checkbox"/>	Other <input type="checkbox"/>	
5.0 Infrastructure Providers Involved			
6.0 Issues & Challenges			
7.0 Successful Solutions			
8.0 Possible Solutions to Explore			
9.0 Summary Learning Points & Action			
9.1 Learning Points			
9.2 Secretariat Actions			